

# Document Management

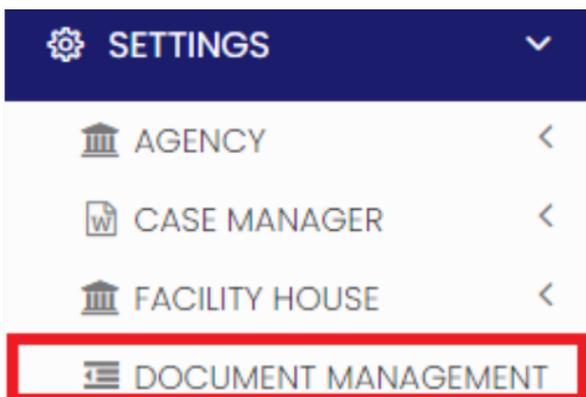
Document management in home health care involves efficiently organizing and storing patient records, treatment plans, and related documents to ensure high-quality care.

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

## Adding New Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Folder, select the User type Referral/ Employee and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

DOCUMENT MANAGEMENT

Edit Document Management Save Cancel

**User Type\*** Referral **Assignee\*** Clark, Samuel **Documentation Type\*** Internal **Folder / Subfolder\*** Folder **Section Name\*** Care Plan  
**Role\*** Administrator, Clinical Team, ... **Color Scheme\*** #a81b1b **Is Time Based** No **Show To All** Yes No

Refresh Active

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
Select	Select	Name	Select	Name	Select	Select	Search Reset
Referral	Internal		Folder	Care Plan	No	No	 
Employee	Internal		Folder	Documents	No	No	 
Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	 

# Editing Folder

## Settings >> Document Management

Select the Folder from List and click Edit option on the right side of the screen.

Edit Document Management Save Cancel

**User Type\*** Referral **Assignee\*** Clark, Samuel **Documentation Type\*** Internal **Folder / Subfolder\*** Folder **Section Name\*** Care Plan  
**Role\*** Administrator, Clinical Team, ... **Color Scheme\*** #8c2b2b **Is Time Based** No **Show To All** Yes No

Refresh Active Disable Selected

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
Select	Select	Name	Select	Name	Select	Select	Search Reset
<input checked="" type="checkbox"/>	Referral	Internal	Folder	Care Plan	No	No	 
<input type="checkbox"/>	Employee	Internal	Folder	Documents	No	No	 
<input type="checkbox"/>	Referral	Internal	Folder	TIMESHEET 2023	Yes	Yes	 
<input type="checkbox"/>	Referral	Internal	Subfolder	Plan of Care (485) 2023	No	Yes	 
<input type="checkbox"/>	Referral	Internal	Subfolder	Plan of Care (485) testing	No	Yes	 
<input type="checkbox"/>	Referral	Internal	Subfolder	Incident Report RR1	No	Yes	 
<input type="checkbox"/>	Employee	Internal	Folder	reports	No	Yes	 
<input type="checkbox"/>	Employee	Internal	Folder	auth	No	Yes	 

Edit the required information and click Save option.

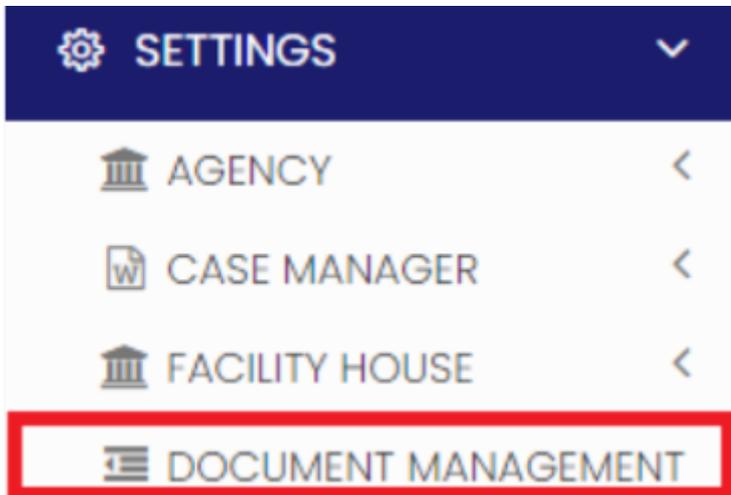
Edit Document Management Save Cancel

**User Type\*** Referral **Assignee\*** Clark, Samuel **Documentation Type\*** Internal **Folder / Subfolder\*** Folder **Section Name\*** Care Plan  
**Role\*** Administrator, Clinical Team, ... **Color Scheme\*** #8c2b2b **Is Time Based** No **Show To All** Yes No

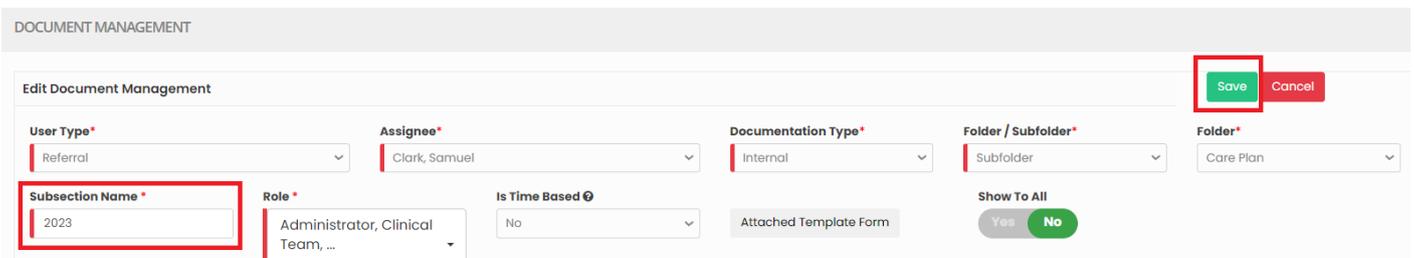
# Adding New Sub-Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Sub-Folder, select the user type Referral/ Employee, select the Folder name in which the sub folder has to be added and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

A screenshot of the "DOCUMENT MANAGEMENT" section, specifically the "Edit Document Management" form. The form contains several fields: "User Type\*" (Referral), "Assignee\*" (Clark, Samuel), "Documentation Type\*" (Internal), "Folder / Subfolder\*" (Subfolder), and "Folder\*" (Care Plan). Below these are "Subsection Name\*" (2023), "Role\*" (Administrator, Clinical Team, ...), "Is Time Based" (No), "Attached Template Form", and "Show To All" (Yes/No buttons). A "Save" button (green) and a "Cancel" button (red) are located at the top right of the form area.

# Editing Sub-Folder

**Settings >> Document Management**

Select the Sub-Folder from List and click Edit option on the right side of the screen.

DOCUMENT MANAGEMENT

**Edit Document Management** **Save** **Cancel**

**User Type\*** Referral **Assignee\*** Clark, Samuel **Documentation Type\*** Internal **Folder / Subfolder\*** Subfolder **Folder\*** Incident Report  
**Subsection Name\*** RR1 **Role\*** Administrator, Clinical Team, ... **Is Time Based** No **Attached Template Form** **Show To All** Yes No

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input checked="" type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	

Edit the required information and click Save option.

DOCUMENT MANAGEMENT

**Edit Document Management** **Save** **Cancel**

**User Type\*** Referral **Assignee\*** Clark, Samuel **Documentation Type\*** Internal **Folder / Subfolder\*** Subfolder **Folder\*** Incident Report  
**Subsection Name\*** RR1 **Role\*** Administrator, Clinical Team, ... **Is Time Based** No **Attached Template Form** **Show To All** Yes No

## Deleting Folder / Sub-Folder

### Settings >> Document Management

For deleting Folder / Sub-Folder in Document Management screen, select the Folder / Sub-folder from List by using the check box of the Folder / Sub-Folder and click Delete option or Disable Selected option on the screen.

DOCUMENT MANAGEMENT

Edit Document Management Save Cancel

User Type\* Referral Assignee\* Clark, Samuel Documentation Type\* Internal Folder / Subfolder\* Subfolder Folder\* Incident Report

Subsection Name\* RRI Role\* Administrator, Clinical Team, ... Is Time Based No Attached Template Form Show To All Yes No

Refresh Active **Disable Selected**

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
Select	Select	Name	Select	Name	Select	Select	Search Reset
Referral	Internal		Folder	Care Plan	No	No	
Employee	Internal		Folder	Documents	No	No	
Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input checked="" type="checkbox"/> Employee	Internal		Folder	reports	No	Yes	
Employee	Internal		Folder	auth	No	Yes	

# Restore Deleted Folder / Sub-Folder

## Settings >> Document Management

The Deleted folder can be viewed by using the dropdown option Deleted after the Refresh option in the screen.

DOCUMENT MANAGEMENT

Edit Document Management Save Cancel

User Type\* Select Documentation Type\* Internal Folder / subfolder\* Select Name\* Name Role\* Select

Is Time Based No Attached Template Form

Refresh Active **Deleted**

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
Select	Select	Name	Select	Name	Select	Search Reset
Employee	Internal	Professional Document	Subfolder	Certificate	No	
Employee	Internal		Folder	Professional Document	No	
Referral	Internal		Folder	Plan of Care (485)	Yes	
Employee	Internal		Folder	RE Plan of Care	No	
Employee	Internal		Folder	PC Plan of Care	No	

Now the Deleted folder can also be restored by using the option Active on the right side of the screen.

Edit Document Management Save Cancel

User Type\*  Documentation Type\*  Folder / Subfolder\*  Name\*  Role\*

Is Time Based  Attached Template Form

Refresh Deleted

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
<input type="checkbox"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Name"/>	<input type="text" value="Select"/>	<input type="text" value="Name"/>	<input type="text" value="Select"/>	<span>Search</span> <span>Reset</span>
<input type="checkbox"/>	Referral	External		Folder	Patient Test Report	No	<span>Active</span>

Showing 1 to 1 of 1 records

Revision #11

Created 17 October 2023 19:27:09 by Thamarai

Updated 23 November 2023 22:12:27 by Thamarai